DOCUMENT RESUME

ED 140 022 CE 011 264

AUTHOR	Levine, Herbert A.
TITLE	Paid Educational Leave. NIE Papers in Education and Work: Number Six.
INSTITUTION	Rutgers, The State Univ., New Brunswick, N.J. Labor Education Center.
SPONS AGENCY	National Inst. of Education (DHEW), Washington, D.C. Education and Work Group.
PUB DATE	Mar 77
CONTRACT	NIE-P-76-0159
NOTE	55p.
AVAILABLE FROM	U.S. Department of Health, Education and Welfare, National Institute of Education, Education and Work Group, Washington, D.C. 20208
EDRS PRICE	MF-$0.83 HC-$3.50 Plus Postage.
DESCRIPTORS	*Adult Education; Adult Programs; Comparative Education; *Continuous Learning; *Educational Opportunities; Educational Policy; Educational Practice; Educational Programs; Employer Employee Relationship; Financial Support; Government Role; Inservice Education; Inservice Programs; International Studies; Labor Education; Labor Unions; *Leave of Absence; National Programs; National Surveys; Off the Job Training; On the Job Training; *Released Time; School Industry Relationship
IDENTIFIERS	Europe; International Labor Organization; Organisation for Economic Cooperation Development; United States

ABSTRACT

This report is a digest of a larger work, "Developments in Paid Leave of Absence," a report including case studies and analysis of the collective experience of nine European countries and the United States with paid educational leave. Section I defines paid educational leave as "leave given to an employee for educational purposes for a specified period during working hours, with adequate financial entitlements." Section II discusses developments within the International Labor Organization and that body's recent acceptance of a convention on paid educational leave. The history of the support of the concept by the Center for Educational Research and Innovation of the Organization for Economic Cooperation and Development is also recounted. Section III summarizes a study of the paid educational leave programs in 10 countries (Belgium, Denmark, France, Germany, Italy, the Netherlands, Sweden, the United States, the United Kingdom, and Yugoslavia). Section IV reviews the interest shown, the perspective, the potential benefits, and the roles played by labor, management, government, and education with regard to paid educational leave as it developed in various countries. The final section highlights the potential significance of paid educational leave, recrurrent education, and continuing education and offers some suggestions for adjustments in American educational policy and practice. A biographical note on the author is included. (LBS)

Documents acquired by ERIC include many informal unpublished materials not available from other sources. ERIC makes every effort to obtain the best copy available. Nevertheless, items of marginal reproducibility are often encountered and this affects the quality of the microfiche and hardcopy reproductions ERIC makes available via the ERIC Document Reproduction Service (EDRS). EDRS is not responsible for the quality of the original document. Reproductions supplied by EDRS are the best that can be made from the original.

ED140022

NIE Papers in Education and Work: Number Six

PAID EDUCATIONAL LEAVE

by

Herbert A. Levine
Director, Labor Education Center
Rutgers - The State University of New Jersey
New Brunswick, New Jersey

March, 1977

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION
THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY

U.S. Department of Health, Education and Welfare
David Mathews, Secretary
NATIONAL INSTITUTE OF EDUCATION
Harold L. Hodgkinson, Director
Education and Work Group
Corinne H. Rieder, Associate Director

Washington, D. C. 20208

HE 011 264

This report was funded by the National Institute of Education under Contract Number NIE-P-76-0159. Its contents do not necessarily reflect the views of the Institute or of any other agency of the United States Government.

NIE PAPERS IN EDUCATION AND WORK

The National Institute of Education was created by Congress in 1972 to help solve problems in American education. One of the Institute's major program areas is education and work. As its name implies, the Education and Work Group sponsors research on the nature of the relationship between schooling and work. It also develops programs which aim at increasing the ability of youth and adults to choose, enter and progress in careers without regard to the barriers imposed by sex or race on career aspirations. In order to further professional understanding of these research and development activities, the Education and Work Group publishes a report series, NIE Papers in Education and Work. The following titles have been selected for publication; other titles are forthcoming:

1. The Development of Career Awareness in Young Children, by Aimee Dorr Leifer and Gerald S. Lesser of the Center for Research in Children's Television, Harvard Graduate School of Education.

2. Facilities Handbook for Career Education, by William E. Gill and Ann W. Luke of System Development Corporation.

3. Sex Discrimination in the Selection of School District Administrators: What Can Be Done?, by Doris M. Timpano of Career Women in Education and Louise W. Knight.

4. Entitlement Papers, edited by Norman D. Kurland, New York State Department of Education.

5. Education and Job Satisfaction: A Questionable Payoff, by Robert P. Quinn and Martha S. Baldi de Mandilovitch, Survey Research Center, The University of Michigan.

6. Paid Educational Leave: A Practical Way To Relate Work and Education and An Effective Way To Implement Life Long Learning, by Herbert Levine, Director of the Labor Education Center, Rutgers University.

7. The Career Intern Program: Final Report (two volumes: Vol. I, An Experiment In Career Education That Worked; Vol. II, Technical Appendices.

8. Influences Affecting Women's Participation in Mathematics (Available summer, 1977.)

9. Industry/Education Community Councils (Available summer, 1977.)

OTHER EDUCATION AND WORK GROUP PUBLICATIONS

1. Education and Work Group: Fiscal Year 1977/1978 Program Plan.

2. Education and Work Group: Select List of Products.

3. Directions in Career Education: Answers to Questions People Ask About Education and Work.

4. Issues of Sex Bias and Sex Fairness in Career Interest Measurement, edited by Esther E. Diamond.

5. Guidelines for Assessment of Sex Bias and Sex Fairness in Career Interest Inventories.

6. The Community Is the Teacher: Experience-Based Career Education.

7. Recurrent Education; edited by Selma J. Mushkin.

Single copies of all the above documents are available at no cost from the Education and Work Group, National Institute of Education, U. S. Department of Health, Education and Welfare, Washington, D. C. 20208. The postal cards at the back of this book may be used for ordering publications.

TABLE OF CONTENTS

Foreword, by Harold L. Hodgkinson, Director, National Institute of Education ii

1. What is Paid Educational Leave? 1

2. The International Discussion 4

The International Labor Organization (ILO) 4
Organization for Economic Cooperation and Development, Center for Educational Research and Innovation 6

3. The Experience of Ten Countries 10

BELGIUM 10
DENMARK 12
FRANCE 14
GERMANY 16
ITALY 22
NETHERLANDS 24
SWEDEN 26
THE UNITED STATES 28
UNITED KINGDOM 33
YUGOSLAVIA 34

4. The Interested Parties 39

5. Afterword 42

Biographical Note 44

FOREWORD

Over three centuries ago, the English poet John Donne challenged his contemporaries and future ages to consider, "no man is an Island, entire of itself; every man is a piece of the continent, a part of the main." At the time, seventeenth century England and the rest of the European continent was solidifying its ties to the new world. These ties have never been broken despite the wars, revolutions, economic and political rivalries that often consumed the energies of the old and new worlds.

In our own century, the Atlantic river has become smaller as Europe and America continue to share in the shaping of Western Civilization.

The present volume and the larger work of which it is a digest, Developments in Paid Leave of Absence, offer the reader the collective experience of nine European countries and the United States to establish programs of financial assistance for employed adults to allow them to continue their education throughout life for career and personal reasons.

This effort was commissioned by the National Institute of Education, the educational research and development agency of the United States Department of Health, Education and Welfare. The case studies and analysis were conducted by the Center for Educational Research and Innovation (CERI) of the Organization for Economic and Cultural Development (OECD) in Paris, an organization of 24 countries dedicated to the development of cooperation among member countries in the field of educational research and innovation.

At NIE the study was directed by Robert W. Stump of the Education and Work Group under the leadership of Corinne H. Rieder, Associate Director. In CERI, the work was directed by Jarl Bengtsson with the assistance of Michael Praderie, Jean Gomm and Thomas Schuller, under the leadership of James R. Gass, Director of CERI.

This digest, compiled by Dr. Herbert Levine of the Labor Education Center, Rutgers University, with the assistance of Mr. Stump, is intended to serve as an introduction to the subject for administrators, policy makers and leaders in industry, labor and government.

By making this volume available in the United States, we hope to stimulate a discussion on these programs and further the serious consideration of the benefits they can produce for American citizens and American society.

Harold L. Hodgkinson
Director
National Institute of Education

1. What is Paid Educational Leave?

How the nation can more significantly relate the worlds of work and education might be designated a central question for education in the bicentennial year of the United States.

Successive presidents of the United States have called attention to the need for cooperative action by management, labor, education and government in the continuing effort to improve American education.

A recent study by Willard Wirtz and the National Manpower Institute reinforces this view and adds a critical dimension.[1]

> ". . .[A] good deal of the American achievement traces in one way or another to the development of education and work as coordinate forces. They have, however, been distinctly separate developments controlled by independent institutional sovereignities--with the consequence that in most peoples lives learning and earning pass as totally isolated chapters." Wirtz suggests, "that some kind of provisions for interspersing the earning and learning of a living, for interweaving employment and self-renewal is going to have to be recognized as the essential condition for an effective career as worker, citizen or human being."[2]

Paid Educational Leave

Paid Educational Leave is one practical way to achieve this new and effective relationship between work and education. Adult workers have a special need for time, money, opportunity and incentive to enable them to participate in educational activity.

Paid Educational Leave, leave given to an employee for educational purposes for a specified period during working hours, with adequate financial entitlements, can offer individuals the time, the money and the security of their

---

[1] The Boundless Resource: a prospectus for an Educational/Work Policy, Willard Wirtz and the National Manpower Institute, New Republic Book Company, Washington, D. C., 1975.

[2] Ibid., p. 1.

livelihoods as they seek new learning for vocational or self-improvement purposes. It can help working adults realize the promise contained in the concepts of recurrent education, continuing education and life-long learning.

Recurrent Education

The concept of Recurrent Education has developed in the recent history in Western Europe and the United States and reflects a renewed interest in allowing adult employees the opportunity to take advantage of an educational opportunity without losing their means of livelihood.

Recurrent Education is a comprehensive educational strategy for post-compulsory education, the essential characteristic of which is the distribution of education over the total life span of the individual in a recurring way, i.e., in alternation with other activities, principally with work, but also with nonemployment and retirement.[3]

Paid Educational Leave and Recurrent Education are not as familiar terms in the United States as they are in Europe although hundreds of thousands of Americans enjoy similar benefits each year.

The Ten Nation Study

The events and programs described in this monograph and the larger volume of which it is a digest[4] tell the story of new ways in which employed adults are able to enter educational programs for their own benefit, for their enterprises' benefit and, hopefully, for the benefit of us all.

---

[3]See two publications by the Organization for Economic Cooperation and Development (OECD), Center for Educational Research and Innovation (CERI) for a more detailed explanation of recurrent education, Recurrent Education, A Strategy for Lifelong Learning (Paris 1973), and Recurrent Education: Trends and Issues (Paris 1975).

[4]Developments in Educational Leave of Absence, Center for Educational Research and Innovation (CERI) Organization for Economic Cooperation and Development (OECD) Paris, 1976. Copies of this CERI/OECD publication are available in the United States from OECD Publications Center, Suite 1207, 1750 Pennsylvania Avenue, N.W., Washington, D. C., 20006.

While education has long been available to adults in the United States and most of the countries studied several aspects of paid educational leave show us a new look:

- The purpose of paid leave programs go beyond job training and specific skill development.
- The principle of a right to educational programs is being accepted by employers, union and government bodies.
- The proportion of employed adults eligible for these programs is being expanded.
- New partnerships among unions, employers and educators are being formed to promote these benefits for individuals.

To set the scene for this summary of events in several countries, the next section discusses developments within the International Labor Organization and that body's recent acceptance of a convention on paid educational leave. The history of OECD/CERI's support of these notions is also recounted. Section III summarizes the detailed analysis of the 10 country programs in the full report. Section IV reviews the interest shown, the perspective, the potential benefits and the roles played by labor, management, government and education with regard to Paid Educational Leave as it developed in various countries. The final section highlights the potential significance of Paid Educational Leave, Recurrent and Continuing Education and offers some suggestions for adjustments in American Educational policy and practice.

Throughout this summary, the reader's attention is drawn to the full report, Developments in Educational Leave of Absence.

2. The International Discussion

The International Labor Organization (ILO)

The significance of the International Labor Organization's Convention on Paid Educational Leave lies both in the process of approval and the substance of the Convention.

For seven years, representatives of government, labor and management from 130 countries analyzed, discussed, researched, negotiated, compromised and finally, in June 1974, adopted both an ILO convention and a very substantive recommendation on paid educational leave.[5]

Throughout this long process, the representatives of labor, management and government refined their areas of agreement and disagreement through working committees at the international level and through discussion, negotiations and political activity in their respective countries on methods of increasing the vocational, general and civic educational opportunities available to employed adults with specific focus upon paid educational leave.[6]

This international effort marked a giant forward step toward international understanding and action with regard to educational opportunity programs for workers and their families. It also mirrored the process taking place in several countries and probably countless bargaining tables to come to an agreement about the purpose and process of Paid Educational Leave.

The ILO sets the context for its position in these words:[7]

> Considering that the need for continuing education and training related to scientific and technological development and the changing pattern of economic and social relations calls for adequate arrangements for

---

[5] Ibid., Annex 1, p. 221.

[6] Paid Educational Leave, Report IV 1 & 2 International Labour Conference, 59th session 1974. Also see Report VI 1 & 2, 58th session 1973. Also see Paid Educational Leave, Alan Charmley, Hart Davis Educational Division, Surrey Fine Art Press Ltd., London, 1975.

[7] Developments, p. 221.

leave for education and training to meet new aspirations, needs and objectives of a social, economic, technological and cultural character, and

Considering that paid educational leave should be regarded as one means of meeting the real needs of individual workers in a modern society, and

Considering that paid educational leave should be conceived in terms of a policy of continuing education and training to be implemented progressively and in an effective manner.

The ILO Convention then explains the agreed-upon scope, purpose and provisions for implementing paid leave programs:

Each member of the ILO is encouraged to formulate and apply a policy designed to promote, by methods appropriate to national conditions and practice and by stages as necessary, the granting of paid educational leave for the purpose of:

(a) training at any level;
(b) general, social and civic education;
(c) trade union education.

The policy should be designed to contribute on differing terms as necessary -

(a) to the acquisition, improvement and adaptation of occupational and functional skills, and the promotion of employment and job security in conditions of scientific and technological development and economic and structural change;
(b) to the competent and active participation of workers and their representatives in the life of the undertaking and of the community;
(c) to the human, social and cultural advancement of workers; and
(d) generally, to the promotion of appropriate continuing education and training, helping workers to adjust to contemporary requirements.

The policy should take account of the state of development and the particular needs of the country and of different sectors of activity, of other social objectives, and of national priorities.

It should be coordinated with general policies concerning employment, education and training as well as policies concerning hours of work, with due regard as

appropriate to seasonal variations of hours of work or of volume of work.

The means by which provision is made for the granting of paid educational leave may include: national laws and regulations, collective agreements, arbitration awards and such other means as may be consistent with national practice.

It should be recognized that paid educational leave is not a substitute for adequate education and training early in life and that it is only one of a variety of means for continuing education and training.[8]

In the seven years it took to write this convention, the representatives of governments, labor unions and management came to agree on several principles guiding Paid Educational Leave programs, including:

- Workers should have the right to educational opportunity without having to give up their jobs or sacrifice their income and other benefits.
- Workers should remain free to decide in which education or training program they wish to participate.
- Education and training programs should be developed with the threefold objective of: (a) concern with the national interest, (b) the needs of the specific industrial enterprise and (c) the individual's self-improvement.

Organization for Economic Cooperation and Development, Center for Educational Research and Innovation

Parallel to the activities of the ILO, the Center for Educational Research and Innovation (CERI), the educational research arm of the Organization for Economic Cooperation and Development (OECD) in Paris, was pioneering discussions and development of the Recurrent Education theme and its enabling programs of Paid Educational Leave.

---

[8]Ibid., p. 222.

The volume being summarized here is the third in a series of OECD/CERI studies on Recurrent Education. The first, Recurrent Education: A Strategy for Lifelong Learning (Paris 1973), offers one of the earliest comprehensive discussions of Recurrent Education's objectives and how it can be integrated with the present education system and other institutions of our society (e.g., employers, labor unions and government policies).[9]

OECD/CERI suggests that the policy of recurrent education aims not at replacing current educational systems but at modifying them so that access to education is not confined to the early years, but is available to individuals, in alternation with work or other activities, over his or her lifetime. The notion of Recurrent Education contains two essential elements:

(a) It offers an alternative educational strategy to the conventional one by which all formal and full-time education is concentrated in youth, i.e., between the age of five, six or seven until late adolescence, and it proposes to spread post-compulsory education over the full life span of the individual. Thus, it accepts the principle of life-long learning.

(b) It proposes a frame within which life-long learning will be organized--this being the alternation and effective interaction between education, as a structural learning situation, and other social activities during which incidental learning occurs.[10]

A second volume, Recurrent Education: Issues and Trends (Paris 1975), reviews developments in Recurrent Education both within formal secondary and postsecondary institutions and among employers in the world of work. This book stresses the importance of what employers and unions are doing, independent of the formal educational institutions, to promote recurrent educational opportunities, and especially paid educational leave.

After conducting the 10 case studies reported in Developments (Paris 1976) and digested in the next section,

---

[9] See also Recurrent Education, Selma J. Mushkin, editor. National Institute of Education, U.S. Department of Health, Education and Welfare, Washington, D. C., 20208, March 1973.

[10] Recurrent Education: A Strategy for Learning, OECD/CERI, Paris 1973.

the OECD/CERI effort has begun to focus on questions of participation in paid leave programs. Because of the newness of many of these programs, little information was available on who participates, what they study and what benefits they receive.

Preliminary estimates show that in France, only three percent engaged in individually selected educational effort. In Belgium, despite the large number of workers enrolled for education courses, only an estimated 10 percent or 15 percent applied for and received educational leave benefits. The study of union education programs in the United States was not a complete study on Paid Educational Leave but indicated that the rate of participation in these programs was startlingly low.

The OECD/CERI studies were used by the European Ministers of Education* at their June 1975 meeting which resolved to give active encouragement to the following lines of action in their respective countries:

- providing education for the 16-19 age group which prepare both for future periods of study as well as for entry into working life in the immediate or near future;
- adapting other post-compulsory education to meet the needs and interests of individuals with widely different experience;
- recasting the rules of admission to higher education so that work experience is more widely taken into account as a basis of qualification for entry;
- redesigning, on a modular basis, extended programs of post-compulsory education and training, so that qualifications can be obtained in different ways and at different times through recurrent periods of study.

---

*The Ministers are national officials with responsibility for the educational systems in their countries, analogous to the duties and responsibilities of the superintendent of education in each of the 50 states of the United States, although they also supervise institutions at the postsecondary level.

Concerned with the reasons for seemingly low participation rates, needing to better understand the workings of specific programs and in the expectation that more examples of recurrent education could be found within member countries, OECD/CERI has sponsored several pilot studies of Paid Educational Leave. The factors which enhance or hinder participation, specific examples of recurrent education programs and preliminary indications of whether or not paid educational leave programs have been effective will all be discussed in these studies.

With this as a background to the international interest in paid educational leave for employed adults, the next section summarizes the purposes and policies of paid leave programs in nine Western European countries, and the union-management agreements for educational leave in the United States. These summaries are based primarily on papers developed by Madame Blanchez (Belgium), M. Westergaard (Denmark), P. Perry (England), J. P. Clerc (France), H. Rudolph (Germany), M. Pagnoncelli (Italy), M. Shop (Netherlands), M. Andersson (Sweden), H. A. Levine (United States) and M. Bezdanov (Yugoslavia).

3. The Experience of Ten Countries

This section will outline the ways that Paid Educational Leave has been established and administered--through legislation, through collective bargaining agreements and unilaterally established union or management programs. All of the countries seem to have become aware in the late 1950's and 1960's of the need for part-time education for workers of all ages but especially for young workers. In every country, legislation was passed to enhance vocational educational opportunities. General and civic education followed shortly thereafter.

In considering the educational needs of workers, nations quickly turned their attention to part-time and recurrent educational opportunities. By the early 1970's, they were beginning to see collective agreements and/or legislation on Paid Educational Leave as a practical means of making these educational opportunities a reality.

BELGIUM[11]

1973 "an act granting credits of working hours to workers with a view to increasing their social mobility."[12]

Part-time educational opportunities became available for young workers in Belgium as early as 1957. On July 1, 1963, a law, modified by the law of April 10, 1973 and by a Royal Decree of April 28, 1975, provided indemnity and some right to leave for certain categories of workers.

The means of providing these rights to paid educational leave was discussed among the various social and political bodies in Belgium for over a decade. In 1971, the Conseil National du Travail, the official body that brings together representatives of employers and employees at national and professional level, studied proposals for a system of credit hours. These consultations resulted in the law of 1973. The system constitutes a significant plank in the programs

---

[11]This section is a summary statement of the report on Education Leaves of Absence in Belgium, Developments, p. 98.

[12]The term Credit Hours is the Belgium equivalent for educational leave.

of several political parties and is advocated by the trade unions.

Workers are eligible for Credit Hours if they are less than 40 years of age, engaged full time under a contract for the hiring of labor and attend training courses organized or supported by the State. The act also applies to employers but specifically does not apply to public employees at any level. Further, bills have been adopted to allow self-employed workers to receive the equivalent of Credit Hours. Workers have the right to be absent from work without loss of regular salary: 1) for a period equal to the number of hours spent in a year of part-time classes, if they have already completed two years of vocational training; 2) they are eligible for one-half the number of hours spent in the first year of vocational schooling.[13]

The Belgian law grants credit hours as compensatory leave, since it is expected that workers will engage in after-hours vocational study and thereby "earn" the educational leave. Credits may be used as follows:

1. either all the credits during the period immediately preceding the end of year examinations;

2. a) half the credits in the period immediately preceding the end of year examinations, and b) the remaining credits as leave allocated per month or per week;

3. or, all the credits as leave allocated per month or per week.[14]

Some 6,700 workers, or only 15 percent of the forecast of 50,000 actually participated in the Credit Hours program. Possible reasons are motivation, lack of information about the law, the necessity for workers to engage in education programs before they become eligible for leave and/or the indifference of employers. It appears that a substantial number of workers attend classes but do not lay claim on their employer for the Credit Hours of educational leave because of a feeling they will be penalized in some fashion.

The low participation rate and a relatively heavy drop out rate among workers taking courses of social mobility have

---

[13] Ibid., p. 101.

[14] Ibid.

caused the Belgian government to adopt numerous extensions of the law. These include efforts to increase participation by providing credit equal to 25 percent of the hours of courses taken in the first year, by including general education in the eligible courses, by extending coverage to agricultural workers taking courses in agriculture, horticulture or domestic economy, to employees taking courses in music, literature and graphic arts, to employees taking courses with a view to their economic, social and cultural mobility and to employees who take courses at university level of long duration given in the evenings.

Madame Blanchez reflects on the national discussion which goes on in Belgium. "The existence itself of the law of Credit Hours, the debates that preceded its promulgation and the extension of its field of coverage clearly demonstrate the importance of the process in Belgium, even if the application of the law has proved to be less successful than expected, as the small numbers of participants shows."[15] Thus, it appears that Belgium has a substantive base upon which to build a system of recurrent education for workers in the private sector. In the coming years, attention will have to be given to the age limitations, to extention of eligible forms of educational opportunity and to the educational needs of public employees.

DENMARK[16]

Paid Educational Leave or Other Fringe Benefits

Although the Danes voted unanimously for the ILO conventions and recommendations, there has been no national collective agreement, nor any pressure for national legislation on paid educational leave as defined by the ILO. Instead, it appears that the Danes will continue to manage the educational problems that have arisen on the Danish labor market within the framework of existing arrangements. The Danes appear to believe that the Danish labor market education and other activities have positively contributed to an adaptable workforce so that the need for supplementing offers of the educational leave type has not been regarded as particularly pressing.

---

[15] Ibid., p. 105.

[16] This section is a summary statement of the report on Educational Leave of Absence in Denmark, Developments, p. 112.

Danish employers, traditionally resistent to negotiating away any more of their rights than absolutely essential, are not being pressed by the Danish labor movement. It appears that the Danish trade unions are concerned about the right of workers on educational leave to return to their jobs; the employer may use his right to dismiss the workers. Danish trade unionists feel that special protection for educational leave participants may result in discrimination in job security against those who do not participate. Another concern of the Danes seems to be a belief that educational leaves of absence with the right of return to the job would act as a barrier to the movement of laborer between skills and industry sectors by tying vocational qualifications too closely to a particular skill, company or industrial sector.

Present arrangements in Denmark provide educational leaves of absence for the specific vocational needs of various workers such as apprentices, skilled workers and public employees. Public funds cover all expenses incurred in the training of employees in public organizations--a useful approach embodying a strict job-related focus. A 1974 report on Support for Adults during Occupational Training, written against the background of the country's current economic position and high unemployment rate, suggests that Denmark will give priority to the adaptation of the workforce to meet changing economic conditions and the updating of occupational skills rather than to a broader interpretation of Educational Leave for personal, social and cultural reasons.

Another form of leave which has developed into collective agreements is the right of shop stewards. For a long time, the trade unions have exerted pressure to secure the right of shop stewards to participate in meetings and educational activities during working hours without loss of income. To a large extent, these aims have been considered as special provisions of protection for the shop stewards and have been integrated in collective agreements. They enable shop stewards to attend courses arranged by the trade unions during working hours, even in cases where the course has no direct relationship to the production or working conditions of the firm.

As provided in the 1973 collective agreement, shop steward education is supported by employer contributions of one øre per working hour to a special education fund. The trade unions alone have the right of disposal of three-quarters of this fund, while the rest is administered in cooperation with the employers. It has not yet been decided how the fund is to be used, but it is probable that the trade unions will use it to fund an educational drive among shop stewards and other trade union representatives at the places of work.

FRANCE[17]

1971 "The organization of continuing Vocational training within the framework of permanent education."

In the early 1950's and 1960's, only a few people in industry and unions and some professional educators called for substantive changes in form and practice. In 1966, a law was passed giving workers the right to study leave but no steps were taken to implement it. A law in 1968 offered a method by which public institutions could help private firms to fund the educational leave.

May 1968 marked perhaps the most turbulent economic, social and political conditions France has seen in the post-war period. The aftermath of these events convinced even the more conservative elements that something must be accomplished in the industrial sphere to improve conditions in the workplace. By 1970, the leading French Confederations of Trade Unions and the French Confederation of Employers successfully negotiated a national agreement providing for paid educational leave for all workers covered by this collective bargaining process.

The Law of 1971 reflected a spirit of general accord among the political and economic power groups despite the reservations some groups may have entertained about various aspects of the legislation.

The essence of the 1971 law established the right of workers to paid educational leave, subject to few limits. Some 11 million workers were covered in the initial period. Millions more have since been added by decree and common practice. The law provided the funds to implement its provisions by orering all companies with more than 10 workers to dedicate a certain sum towards training. The initial sum was .8 percent of wages, with an upward adjustment of this sum to two percent of wages in 1976.

A significant aspect of the French approach is the structure developed to control the system, the elements of which were evident as early as 1966. Overall administration is in the hands of an interministerial committee which meets regularly on national policy and interagency concerns. Under this committee are two groups, a permanent group of high-level civil servants and a fund management council for

---

[17]This section is a summary statement of Educational Leave of Absence in France, Developments, p. 126.

vocational and social advancement. The general secretariat of high-level civil servants is the day-to-day operating organ for the system. The national council which meets annually is composed of some 150 people representing management, labor, professional educators and public authorities. Its advice is sought on policies to be adopted by the interministerial council.

Between the annual meetings, a permanent delegation of the national council, six representatives of management, six from the unions or professional organizations and one public servant, meets with the permanent group of civil servants on a regular basis. This national system has branches in the local regions and Departments (or States).

There are problems facing management, the trade unions, government and the individual citizen in this effort to enhance educational opportunity in the mutual interest of all concerned. Areas of concern include the extent of control over training and education, the source and administration of funding, the determination of standards, and the quality and nature of training being offered.

It is too early to assess definitively the course upon which the French have embarked. It appears that the greatest number of participants so far have been engaged in vocational and career training--the result of management-directed training efforts provided by inplant training or through one of a rapidly growing number of private manpower training companies. Estimates are that perhaps one or two percent of participating workers have selected educational opportunities of their own choosing on their own initiative. Trade union members, professional educators, enlightened managers and government representatives in France are seriously studying the accumulating data with a view towards making as real as possible the promise of the law of 1971.

Concern for the success of the law was expressed publicly by Paul Grouet, former State Secretary for Professional Training on March 28, 1976. "Far too few Frenchmen take advantage of the legal opportunity for improving their professional skills or general background through adult education." Thus, after four and a half years, there appears to be a gap between the goals of the law and the interest of the potential beneficiaries or in their ability to effectively participate in the programs.

Jean Pierre Soisson, the new official in charge of the program, declared that his priority in the coming period will be "a campaign of information so that people would at least know they have access to more education."

French trade unions appear convinced that paid study time should not be limited to 160 hours. The unions would also like to obtain a management guarantee that automatic promotions go to those who successfully complete a study program.

Mr. Grouet has come forth with a new proposal which would give every salaried person the right to extended "education vacations" once or twice in a lifetime for up to one year. He appears to be optimistic about the possibility of amending the law of 1971 in this regard.

GERMANY[18]

1974 Leave for vocational, general and political education

Germany, beset by a constellation of economic, social and political considerations, has engaged itself in a national effort to revamp apprenticeship and other vocational training programs. Within this context, the German labor movement and the Social Democratic Party have taken the initative in developing proposals for a system of paid educational leave.

In 1969, the federal government adopted three significant laws in three months.

The Labor Market Promotion Act, June 20, 1969

The Vocational Training Act, July 10, 1969

The Individual Education Assistance Act, September 19, 1969

The acts, however, did not provide for paid educational leave. Rather, they were three separate measures to strengthen the system of vocational and manpower training in Germany.

The Labor Market Training Act makes available grants for tuition, fees, materials and other educational expenses as well as subsistence allowances (relative to prior income) to individuals who have paid unemployment insurance dues for a specified time and who enroll in approved courses.

---

[18]This section is a summary statement of Educational Leave of Absence in the Federal Republic of Germany, Developments, p. 149.

The Vocational Training Act set up a national unified legal framework in which public responsibility for vocational training and education would be finally recognized. The scope of the act, however, was limited to extracurricular plant or shop vocational training, usually focused on initial vocational training and education, and did not apply to the traditional Trade Regulations, under which two-thirds of all industrial training programs were organized. No provision for funding or financing were contained in the act, leaving the expansion of vocational training to the willingness of factories and businesses to make this investment.

The Individual Education Assistance Act provided grants for cost of training and subsistence while attending training programs in upper divisions of secondary schools. Non-vocational education was not covered by the act.

The reasons for the limited scope and coverage of these acts are evident in the divergent opinions expressed during the debate, by the social scientists, the industry, business and trade guild representatives and the labor unions.

Numerous social scientists argued in favor of removing the funding of such a program out of the shop or plant sphere in order to guarantee mobility between different plants and shops. They were basically skeptical at least at the time, with respect to the feasibility of introducing a program of paid educational leave because, among other reasons, of the lack of educational facilities. If there were to be any discussion of educational leave at all, then it ought to be limited exclusively to vocational training and education and made dependent upon the individual's willingness to pay part of the costs out of his or her own pocket.

Representatives of industry, business and the trade guilds spoke out against the introduction of a program of paid educational leave for the following reasons:

- the costs would be prohibitive for smaller and medium sized businesses;
- there would be legal difficulties in preventing persons from taking unjustified advantage of the program;
- the willingness to go to school would certainly not be enhanced by making it a right, and finally
- there isn't really any need for legislation of this type inasmuch as advanced vocational training

> and adaptation in most cases is closely coordinated to the job situation and plants and shops--when necessary--already grant leave for this purpose to a large extent.
>
> It would be out of the question they said to ask business to finance aid for educational leave for socio-political education programs. The same doubts would hold true for any contractual solution for paid educational leave.
>
> Labor representatives, in their demands for paid leave for educational purposes, argued that educational leave as a constant upgrading of education would ultimately be more economical than reschooling at various intervals in a person's life. Thus in terms of national economy, paid educational leave was indeed a justifiable concept and a necessity in terms of labor market policy. With respect to the subject matter of educational leave programs, the strict differentiation between vocational and political education has become obsolete anyway. In any event, it must be recognized that aid and assistance for vocational training and education would certainly enhance the chances for positive economic growth, whereas it is not at all clear that this would result in favorable distribution effects for the insured labor force. To that extent, the costs of qualification would indeed be socialized, whereas the benefits (at least in part) would flow into the companies and businesses.[19]

Subsequent to this national debate, a number of the German States (Landers) have proposed and/or enacted laws for educational leave of absence. These are generally broader in scope and allow participation in general and political education rather than in vocational training only. The provisions of these proposals are summarized in the accompanying chart.

Figures on participation and cost are not available for the state programs nor for the federal programs, except for those under the Labor Promotion Act. From 1970 through 1973, over 750,000 participated, 25-30 percent of them women. In 1970, the outlay for training under this act by the Federal Administration of Labor was approximately $382 million

---

[19] "Educational Leave of Absence in the Federal Republic of Germany," unpublished paper prepared for NIE by Hedwig Rudolph, 1974.

OVERVIEW OF THE DEVELOPMENT OF EDUCATIONAL LEAVE OF ABSENCE IN THE LANDER

State of the Federal Republic	Principle	Persons Entitled to Leave	Length of Leave	Leave Pa
Berlin	Educational Leave Act of July 16, 1970. Leave for vocational and political education.	All workers and trainees until completion of their 21st birthday.	Unlimited unpaid leave; maximum of 10 days paid leave annually.	Full pay pay-eligi leave fro employer.
Hamburg	Hamburg's Education Leave Act of January 21, 1974. Leave for political education and advanced vocational training.	All workers and trainees. School and university teachers, social work teachers only during school/university/ institution vacation.	10 working days every 2 years, if 6-day working week then a total of 12 days during same period.	Full pay pay-eligi leave fro employer.
Lower Saxony	Lower Saxony Act on Educational Leave for Workers of May 10, 1974. Right to leave for political, vocational and general education courses.	All workers and trainees except for state officials and judges. No. of total educ. vac. days an employer must grant equal total no. of employees as of April 15 of each given year times 1.5.(1)	10 working days per annum, 12 per annum for 6-day work week.	Full pay pay-eligi leave fro employer.
Hesse	Educational Leave Act of June 19, 1974. Leave for vocational and political education.	All workers until the age of 25.	5 working days per annum.	Full pay pay-eligi leave fro employer.

VIEW OF THE DEVELOPMENT OF EDUCATIONAL LEAVE OF ABSENCE IN THE LANDER

Principle	Persons Entitled to Leave	Length of Leave	Leave Payment
ducational Leave Act f July 16, 1970. eave for vocational nd political educa- ion.	All workers and trainees until completion of their 21st birthday.	Unlimited unpaid leave; maximum of 10 days paid leave annually.	Full pay during pay-eligible leave from the employer.
mburg's Education eave Act of January 1, 1974. Leave for olitical education nd advanced voca- ional training.	All workers and trainees. School and university teachers, social work teachers only during school/university/ institution vacation.	10 working days every 2 years, if 6-day working week then a total of 12 days during same period.	Full pay during pay-eligible leave from the employer.
wer Saxony Act on ducational Leave for rkers of May 10, 974. Right to leave r political, vocational and general ducation courses.	All workers and trainees except for state officials and judges. No. of total educ. vac. days an employer must grant equal total no. of employees as of April 15 of each given year times 1.5.(1)	10 working days per annum, 12 per annum for 6-day work week.	Full pay during pay-eligible leave from the employer.
ducational Leave Act f June 19, 1974. eave for vocational d political educa- ion.	All workers until the age of 25.	5 working days per annum.	Full pay during pay-eligible leave from the employer.

State of the Federal Republic	Principle	Persons Entitled to Leave	Length of Leave	Leave Pay
Baden-Wurttemberg	SPD-Party proposal of a law for educational leave from May 22, 1973. Would include leave for political education only.	All workers and persons in training until completion of 25th birthday.	10 working days per annum, 12 per annum for 6-day work week.	Full pay d pay-eligib leave from employer.
Bremen	SPD draft of an educational leave Act from January 29, 1974. Would include leave for political and vocational education leave.	All workers and employees. Unemployed would receive grants for costs incurred in programmes.	10 working days per annum every 2 years, 12 days for 6-day work week	Full pay du pay-eligibl leave from employer.
	CDU-party proposal for education leave Act from February 12, 1974. Leave for vocational, political and general education and advanced training.	All workers incl. state officials, persons in training, mothers and non-employed persons under care.	10 working days per annum, 12 days for 6-day work week.	Full pay du pay-eligibl leave from er. A hard fund would burse 50% o out leave p small and m sized plant
Saarland	SPD draft of education leave Act for young workers from May 10, 1974. For political, general and vocational education.	All workers and persons in training until completion of 25th birthday.	12 working days per annum.	Full pay du pay-eligibl leave from employer.

ciple	Persons Entitled to Leave	Length of Leave	Leave Payment
arty proposal of for educational from May 22, Would include for political tion only.	All workers and persons in training until completion of 25th birthday.	10 working days per annum, 12 per annum for 6-day work week.	Full pay during pay-eligible leave from the employer.
raft of an educa- l leave Act from y 29, 1974. include leave olitical and voca- education leave.	All workers and employees. Unemployed would receive grants for costs incurred in programmes.	10 working days per annum every 2 years, 12 days for 6-day work week	Full pay during pay-eligible leave from the employer.
rty proposal for ion leave Act ebruary 12, 1974. for vocational, cal and general ion and advanced ng.	All workers incl. state officials, persons in training, mothers and non-employed persons under care.	10 working days per annum, 12 days for 6-day work week.	Full pay during pay-eligible leave from employer. A hardship fund would reimburse 50% of paid out leave pay for small and medium-sized plants.
aft of education Act for young s from May 10, For political, l and vocational ion.	All workers and persons in training until completion of 25th birthday.	12 working days per annum.	Full pay during pay-eligible leave from employer.

State of the Federal Republic	Principle	Persons Entitled to Leave	Length of Leave	Leave Paym
Schleswig-Holstein	SPT-party proposal of a law for education leave from October 25, 1974. Leave for vocational and political education.		2 weeks in two years.	

1) If all leave benefits are not exhausted (where total wages exceed 250,000.00 DM.) a prorated fee of 0.6% of total wages is to be paid into a fund at the state tax office (Finanzamt). Fee reduced in ratio to proportion of total leave eligibility to actual leave (total length) granted. Fund to be used for improving educational facilities and opportunities in general.

Source: Nahrendorf, P.: "Der Bildungsurlaub ist der Wahlschlager der Lander" (Education Leave is a Hit in the State Election Campaigns) in: Handelsblatt, June 7-8, 1974.

ciple	Persons Entitled to Leave	Length of Leave	Leave Payment
arty proposal of for education from October 974. Leave for ional and politi- ducation.		2 weeks in two years.	

are not exhausted (where total wages exceed 250,000.00 DM.) a prorated fee of s to be paid into a fund at the state tax office (Finanzamt). Fee reduced in f total leave eligibility to actual leave (total length) granted. Fund to be ucational facilities and opportunities in general.

"Der Bildungsurlaub ist der Wahlschlager der Lander" (Education Leave is a Hit paigns) in: Handelsblatt, June 7-8, 1974.

and rose to $982 million in 1974. The Federal Administration and its programs are financed by equal contributions by employers and employees (one percent of monthly employee earnings from each).

ITALY[20]

1970-1974 The 150 hours and "The Right to Study" for Workers

The wave of worker-student unrest which pervaded Italy during 1969 culminated in substantially improved educational provisions in collective bargaining agreements and in the Law No. 300 of May 20, 1970, called the "Statute of the Right of the Worker."

Earlier collective agreements had concerned themselves primarily with paid leave during examinations and the arrangement of work schedules and overtime hours. Some agreements provided reimbursement for the cost of books and occasionally offered the individual some wage or job adjustments after having passed examinations. However, the numerous limitations and the many decisions which remained at the sole discretion of management led unions and worker-students to press for changes. Thus, article 10 of the 1970 law provides:

> ". . .worker-students enrolled or attending courses in secondary or technical schools, approved or legally recognized or with the ability to award legal diplomas, have the right to working hours which allow them to follow their courses and to prepare for their examinations. They are not required to fulfill supplementary working hours and cannot be working during the periods of weekly rest. Worker-students, including those at the university level, who have to sit an examination have the right to benefit from daily paid leave.
>
> The employee will have the right to insist upon the production of certificates (of attendance) necessary to the exercising of rights laid down in paragraphs 1 and 2."[21]

In this fashion, the law supported worker-student rights but left the detailed arrangements to be negotiated

---

[20]This section is a summary of Educational Leave of Absence in Italy, Developments, p. 165.

[21]Ibid., p. 166.

at the national level or within a company. The law and the 1969-1970 agreements laid the basis for further intensive discussions within the unions with regard to the purposes of education and training.

Unions supported the worker-students in their demands but concluded that the real educational problem facing Italian industrial society was the necessity "to create conditions more favorable to the cultural development of workers (which) would favor a transformation and a renewal of the objectives and cultural content of the educational institutions and their programs."[22] Italian unions, whose strategy included such objectives as "the need for more concrete definitions for new jobs, improvement in working conditions and the acquisition of the right of workers control over the processes and the ends of production" turned their attention to the educational needs of all organized workers.

> In order to cope with these problems properly, the trade unions maintained the necessity of raising the cultural level of the working class in its entirety and transforming the structures of education to guarantee the training of a new type of worker and citizen.[23]

Initially, management preferred to negotiate more narrowly on the worker-student formula for it was simpler to calculate costs and, since the individual student was oriented to his personal social mobility, the company's prerogatives in personnel matters would not be infringed upon by discussing educational activities oriented towards new work relationships. By May of 1973, the continuing dialogue between the unions and corporation representatives resulted in the signing of agreements which provided that "all workers who, with the objective of increasing their own culture, even in relation with the activity of the enterprise, desire to undertake studies within institutions, either public or recognized by the State, have the right to paid leave, up to the number of hours allocated to each employee, spaced over a period of three years."[24]

Each worker was allocated a maximum credit of 150 hours for a period of three years which the individual might use at his own discretion over the contract term or

---

[22] Ibid., p. 167.

[23] Ibid.

[24] Ibid., p. 168.

concentrated within the same year providing that "the training followed had a length of at least double that of the leave requested."[25]

The costs of the "right to study" program are shared. The employer provides the cost of the workers pay while on leave; the State provides for the cost of the training activities; the worker provides for indirect costs, such as the transport, meals, etc., except when more favorable arrangements exist.

As in other countries, the newly won rights have so far only benefited a small number of participants. In 1974, some 20,000 workers out of a potential of 4,800,000 have taken advantage of the available opportunities. In the electrical industry, however, some seven percent of the triannual credit hours have been used in the first year. There is an ongoing discussion in Italy over the purpose of the 150 hours, and practical attempts are being made to restructure educational institutions and class schedules, and to retrain teachers to assist them to more effectively reach adult workers.

NETHERLANDS[26]

1974 For members of Works Councils and Youth, a choice of more holidays, better pensions or paid educational leave

Although the Netherlands employers' representative initially had reservations with regard to the ILO conventions on paid educational leave, the Netherlands delegation voted unanimously for both the Convention and Recommendation. The employers Federation has been the first group to publicly express their favorable response to the ILO actions and they appear ready to play a significant role in the establishment of priorities. Neither the labor movement nor the Government have made public responses since the ILO meetings.

There appears to be agreement on the principle of paid educational leave but serious negotiations on the matter have not yet begun. It seems that consideration is being given by both labor and management to the problem of weighing

---

[25]Ibid.

[26]This section is a summary statement of Educational Leave of Absence in the Netherlands, Developments, p. 174.

the advantages and costs of paid education leave provisions against other fringe benefits such as better pensions, changing work patterns, etc.

A particular consideration is the already agreed upon provisions for leave for trade union education and training financed by corporate contribution of NFl. 15 (about $5.00) for each trade union member they employ. This fund may only be used, under very strict conditions, for general trade union activities. A certain percentage of payroll can also be contributed by the employers. Eighteen collective agreements contain a reference to such funds. Ten specifically apply to education and training for trade union activities. The employers' contribution to general trade union activities in 1973 was approximately NFl. 30 million ($11.1 million). What proportion of this was spent on training activities is unknown. No estimates of annual number of participants are available.

Despite the fact that a specific paid educational leave agreement has not yet been reached in the Netherlands, employers desiring workers to engage in vocational education and training provide educational leave with or without pay, salary maintenance and other financial contributions.

Government workers are likewise encouraged to enroll in courses considered valuable for the service. Such individuals are reimbursed for course fees, travel costs and their salaries are maintained during the approved course. If the course appears somewhat less related to their job, individuals may be required to pay part of their course fees and travel costs.

The government pays the salaries of employee representatives taking trade union education organized by the labor movement and also contributes financially to the costs of such education and training. In 1975, the Government contributed NFl. 3/4 million ($275,000).

Two groups that are granted educational leave of absence under national laws are a) members of Works' Councils and b) young workers.

Members of Works Councils and future candidates on the list are eligible to attend five day residential courses on the laws for Works Councils, the company law, the relationship of Works Councils to the organization, goals and policies of public companies.

Young workers, age 15-16 no longer required to attend school full time, are obligated to attend part-time education programs and are entitled to salary maintenance. To meet

the reservations of employers in employing young workers subject to compulsory part-time education, the government has introduced a premium of NFl. 20 per week (about $7.50) for every employee who has to take two days per week off for this purpose.

Dutch unions placed the issue of educational leave on their program of negotiations for the first time in 1975.

The employers' organizations seem to agree with the necessity of extending education throughout life in the framework of a scheme of recurrent education, but they are concerned over the potential costs of PEL and its relationship to other fringe benefits.

SWEDEN[27]

1975 The principle of the right of all employees in the public and private sectors to leave for educational purposes during working hours

Adult Education in Sweden began as early as the last century but it has entered a new, rapid phase of advancement in the last three decades. Sweden is making an all-out effort to diminish the gap between young people and adults and to improve adult workers' ability to adapt to economic, social and technical change.

On January 1, 1975, Sweden secured the principle of the right of all employees in the public and private sectors to leave for educational purposes during working hours. Fashioned in accord with the ILO Convention and Recommendation, the Swedish law provides leave for general, vocational and trade union education and guarantees the employee the right of return to employment at an income and status equivalent to that which the individual had before taking the leave. The law does not state a maximum or minimum period of leave, nor how many employees may be absent at one time. It also does not provide any scheme of financial support for employees. The law permits employers to defer leave requests under certain conditions, although they must discuss the matter with the trade union representative beforehand.

Thus, the newest Swedish attempt to advance adult education opportunities asserts the legal right of employees

---

[27]This section is a summary statement of Educational Leave of Absence in Sweden, Developments, p. 185.

to educational leaves of absence but relies on the collective bargaining process to spell out the forms and conditions of educational leave. The law provides penalties for employers and unions if they do not perform their obligations under its provisions. The 1975 law was passed by the Swedish Parliament at the behest of the Swedish Confederation of Trade Unions (LO) and the Swedish Central Organization of Salaried Employees (TCO). Swedish employers did not favor the law and would have preferred to continue negotiations with the unions.

Unlike their counterparts in France, the Swedish labor movement and the employers federation could not conclude an agreement on educational leave. Discussions between the Swedish Employers Association and the unions (LO and TCO) raised but did not settle the issues of 1) the right to educational leave, 2) the social benefits to be provided during leave, 3) the question of short-term leaves for leisure-time studies, 4) measures aimed at stimulating adult education, 5) the methods by which employers and unions would perform their parts in administering an agreement. When no agreement was in sight by the 1972 round of negotiations, the unions broke off negotiations and called upon the Ministry of Education to get the principle of the right to educational leave established by law.

It is too early to assess worker interest and participation under the new law. However the activities of the Committee on Methods Testing in Adult Education (Fövux) are directed towards making the opportunities contained in the law a practical reality for workers. Fövux's system of recruiting adults into educational activities such as study circles, folk high schools and to specialized adult training programs has been enhanced by a law of July 1974 which permits a union study organizer to engage in recruiting activities during working hours without loss of pay. These union education recruiters have the advantage of knowing the needs of their fellow workers, have their trust and confidence and can provide constant encouragement and advice over a long period. In addition, they can supplement their exhortations with informative materials and other measures designed to remove obstacles for study.

Recent studies conducted by Fövux emphasize the need for paid educational leave both long and short term. Worker respondents often indicated their reluctance to engage in educational activity at the expense of their home and family life. These respondents emphasized their readiness to study if some provision were made for education during working hours within the context of an effective system of recurrent and continuing education for all working adults in the public and private sector and, as finances permit, all citizens,

including those who work at unpaid socially useful work such as housewives. For shift workers, some combination of work and study during working hours is crucial to their ability to participate in Adult Education. Fövux's experimentation with union recruiters has so far enhanced participation in adult education and because the shop-based union leaders know the work schedule, they can provide management with sufficient notice, understand the ease or difficulties of replacing study applicants and generally have a sense of how the educational effort being made by an individual can help achieve job satisfaction and/or advancement.

All social parties in Sweden agree that priority in educational opportunity, the right to educational leave and the right to obtain various forms of financial assistance, should be given first to adults of low educational attainment, the handicapped, the immigrant, women and other disadvantaged categories. The expectation is that the coming round of negotiations and the anticipated new legislation will permit Sweden to integrate paid educational leave into its educational system.

THE UNITED STATES[28]

Diversity Prevails

The formal school systems of the United States have made little serious effort to tap the extensive resources contained in educational opportunity programs provided unilaterally by American management or through collective bargaining agreements with American labor unions. Nevertheless, it is apparent that American workers are not able to take full advantage of seemingly readily accessible educational opportunity.

These educational opportunity programs cover almost every conceivable form of education and training including basic literacy; high school equivalency; vocational, technical and career education; college-level, advanced degree and post-doctoral study and research for workers; and in some instances, for the families of workers. These opportunities are generally made available for part-time, after-work study. However, depending on the educational level, the needs of the company, and the provisions in the

---

[28]This section is a summary statement of Educational Leave of Absence: The Situation in the United States, Developments, Chapter III, p. 47.

collective agreement, employees are provided with paid leaves of absence, released time from the job, and on-the-job training and education.

These programs are independently conceived and administered with little or no cooperation among corporations, educational agencies, unions or government. There is little or no common meeting ground for discussion of the successes or failures of these programs, for joint experimentation, or even for the sharing of information in the mutual interest of all parties. Unlike many European countries, there is no regularly functioning body composed of appropriate representatives of management, labor, government and formal education which could provide a forum for a continuing discussion of educational opportunity programs. There is no management organization which can assert a national position on the specifics of collective bargaining or on a national educational opportunity program such as those which exist in Denmark, Sweden, France and other countries. Nor does the national AFL-CIO presume to set policy or negotiate for the 130 international unions.

Despite the fact that there is no national planning mechanism for initiating, administering and evaluating educational opportunity programs in the United States, the availability of educational opportunity for adult workers and their families compares favorably with what exists in most countries, in part because of the superabundance of resources available in the United States.

Some highlights and examples of available programs follow.

In its 1969 report on Training and Retraining Provisions in Major Collective Bargaining Agreements, the U.S. Department of Labor, Bureau of Labor Statistics, examined 1,823 major collective bargaining agreements each covering 1,000 workers or more. The study indicated that "fewer than 20 percent (344) of the 1,823 major collective bargaining agreements contained training or retraining provisions." These applied to 2.4 million workers. The report further pointed out that training and retraining clauses were concentrated in transportation equipment, communications, machinery (except electrical), primary metals and food industries.

In 1974, the BLS reported five areas covered by the educational opportunity clauses in major collective bargaining agreements, each covering 1,000 workers or more. Over 8.5 million workers are covered by these agreements offering (1) Educational leave, 138 companies (1,513,950 workers); (2) Apprentice training, 563 companies (2,855,550

workers); (3) Training, 519 companies (3,222,250 workers); (4) Tuition aid, 88 companies (831,550 workers); (5) Training funds, 34 companies (153,850 workers). Even from the limited statistics available to the BLS, a considerable number and variety of educational opportunities have been successfully negotiated into collective bargaining agreements.

As in the European countries, little is known about the participation rates among those eligible for leave; what kinds of people take leave, and for how long a period. We are unable to assess the costs of direct financial aid or production man hours lost, for these figures are obscured even within the specific enterprise or public agency granting such leaves.

In the largest part, American leave provisions cover employed workers who are eligible for the leave based upon a minimum of job seniority. Leave is granted by public agencies and private enterprises for (1) vocational and career education, (2) college education which stresses career advancement, and (3) for trade union education.

When an employee is on a paid leave of absence, his right to return to the job is generally protected within limits. Seniority rights are almost always maintained, and in some cases are permitted to accumulate during the study leave. Pension rights and insurance benefits appear to be most often maintained by the company. This benefit is usually provided for management-level or highly skilled employees and usually in companies which also provide an extensive program of employee education and training. However, other programs are available. Special efforts to upgrade minority group members through training programs calling for released time participation, programs designed to educate women workers who remain on seniority-based recall lists, and pre-retirement and veterans leave programs indicate that the larger social purpose concept of OECD/CERI might be reinforced by some practices in the United States.

In the public sector, many State and local bodies have followed the lead of the Federal Government in setting up programs for their employees. The government Employees Training Act provides that each agency of the Gederal Government:

> . . .shall prepare, establish and place in effect a program or programs, and a plan or plans thereunder . . .for the training of employees in or under such department by, and through Government facilities and non-governmental facilities in order to increase economy and efficiency in the operations of the

department and to raise the standards of performance by employees of their official duties to the minimum level of proficiency.

Employees being given the training can be paid all or part of his salary or compensation. Moreover, expenses necessary to training such as travel and per diem, transportation of family, household effects, tuition, books and materials, etc., may also be paid by the Government.[29]

Despite the fact that statistics are not available, this form of public and private expenditure on paid educational leave represents allocations made for the purpose of improvement of job performance and career development.

Another rather substantial sum is expended by trade unions for paid educational leave for trade union representatives at all levels to attend labor education activities. Some 20 to 30 thousand trade union leaders are authorized by corporations each summer to take educational, union or personal leaves of absence to attend the union's one-week residential schools often conducted in cooperation with a state university or college.

The union pays the wages, expenses and tuition costs of the resident school. The company simply continues the employee's insurance and other benefits without interruption. Seniority is not affected by these short-term programs. Unions also very often conduct steward training programs, conferences and short-term resident programs for specific leaders, such as a three-day program for local union trustees, or pension specialists, or education counselors. In these cases, companies allow the time off and the union finances the activity and provides wage reimbursement to the student.

One of the newer, unilaterally developed corporate plans, which blends the features of educational leave, tuition refund and entitlement to education for family members is that established by Kimberly Clark Corporation in July 1974.

Each individual is provided with an annual personal "bank account" to spend for approved job related and non-job related educational activities (including course fee, room and board, travel and required texts). In addition, a family education account is established at a rate approximately one-half of the individual's annual allotment. This fund is

---

[29]The Government Employees Training Act, 1967.

designed to accumulate over the years and is available for any educational program desired by members of the employee's family. A third feature of this plan entitles a limited number of employees who have demonstrated a high performance to be granted--no strings attached--extended leaves, with pay and at company expense, for the purpose of pursuing "special educational programs" which clearly relate to corporate objectives.[30]

There are other significant programs provided by American management. These include those of Bell Labs, DuPont, IBM, AT&T, RCA, American Airlines and those of trade associates and the American Management Association.

The commitment of these and other corporations to education and training programs for employees can only be guessed at, for no reporting system exists to gather summary data. A recent survey, however, by the Conference Board sought to identify the extent of employee education programs in American corporations with over 500 employees. The preliminary estimates show that these companies spent roughly $2 billion for education and training; employed over 40,000 persons in education-training jobs; and, in addition to supporting participation in outside courses, conducted formal courses "in-house," principally during working hours, in which at least four million employees took part. About 60 percent of this training was judged to be "really the responsibility of the schools to provide" even though almost all the education and training efforts were designed to improve employee efficiency and productivity.[31]

Trade unions administer substantial Educational Cultural Trust funds and other funds negotiated or granted. Such programs include the laborers, the carpenters, the maritime workers, the longshoremen, the Service Employees International Union, some Teamster locals, the Amalgamated Clothing Workers, and the International Ladies Garment Workers Union. No doubt there are many other unions who are engaged in education, training and scholarship activities.

In addition, some 40 universities are engaged in labor education in the United States and there is a growing tendency among community and state colleges to develop programs in the field of labor studies.

---

[30]Money for Education: Educational Opportunities Plan for Employees of Kimberly Clark.

[31]Seymour Lusterman, "Education for Work," The Conference Board Record, Vol. XIII, No. 5, May 1976.

Thus, the United States deserves credit for the variety and extent of its educational opportunity programs for workers and their families supported unilaterally or in cooperation among the social partners and/or government. It remains for the future to develop a national educational policy and program of implementation to achieve the national dialogue.

UNITED KINGDOM[32]

1973 Industrial Training Act - Training for Industrial and National Needs

1975 Industrial Relations Act - Leave for Trade Union Training

The United Kingdom, with its long tradition of private and public support to education, has nevertheless only recently come to grips with the problem of vocational education and training. The most recent efforts are contained in the 1963 and 1973 Industrial Training Acts. These laws have attempted to increase the amount of training opportunities, improve the quality of training, spread the cost of training more evenly, and assure the development of reasonable standards of performance in the training area while at the same time providing maximum freedom to the industry, and introducing the concept of the Levy-Grant System of financing vocational education and training by establishing training boards composed of representatives of government, management and labor and professional educators.

The British acts have focused attention on the national interest and needs for vocational training which sometimes appear in conflict with the policy or program of an individual enterprise. The training boards established under the act serve as proving grounds for labor, management and government representatives to assess and experiment with vocational education and training.

While the 1973 act has created an awareness in some industrial and commercial enterprises as to the value of training, others, particularly smaller firms, simply paid the required levy and did no training. The act established an employment service agency to concern itself with jobs; a training service agency to supervise and support the training boards, and an agency to monitor the Levy-Grant-Exemptions

---

[32]This section is a summary statement of Educational Leave of Absence in the United Kingdom, Developments, p. 201 and some new material on the 1975 legislation.

system which was the focal point of the 1973 revisions of the 1964 law.

The Industrial Training Act, while a great step forward toward rationalizing vocational education and training in Great Britain, did not concern itself with paid educational leave nor has it become, as some professional educators had hoped, the basis for building a national adult education program for workers in British industry.

However, a feature of the 1973 legislation known as the Training Opportunity Scheme may enhance the individual worker's opportunities to engage in career education programs of his or her own choosing. The British have also developed an amazingly successful day-release program which permits limited numbers of specified groups in the industrial enterprise to engage themselves in educational effort on paid released time from work. These programs are generally available through the technical schools and colleges and are publicly funded under education acts not related to industrial training.

Paid educational leave in Great Britain, as in other countries, is available through directed management training and career development programs. Educational leave without pay is generally available to trade union leaders to attend union resident schools, conferences or other educational activities. These leaves are sometimes financed by management as a result of collective bargaining agreements. Where they are not, the trade unions reimburse their representatives for loss of income and expenses.

YUGOSLAVIA

1970 Education: the Basis of Self Government

Yugoslavia has a developed system of educational leave which is administered by the workers councils who decide which individuals are to be given leave of absence for further study. "The determining factor is that the learning and skills to be acquired must be considered as an investment for the self-management unit as a whole. The learning involved is almost always related to the work situation, including an understanding of the technology underlying a particular skill and socio-economic education related to the concept and practices of self-government."[33]

---

[33]This section is a summary of statement of Educational Leave of Absence in Yugoslavia, Developments, p. 210.

Educational leave or complete payment of educational costs are rarely granted to workers who wish to follow some form of education to satisfy their specific personal interest. The following examples are an indications of the forms and purposes for which educational leave is granted:

- free choice of the most suitable shift at their place of work, i.e., the one that will not interfere with the time schedule of courses of study;
- the reduction of working hours for 1-4 hours daily, with full salary or the average personal income;
- paid leave for the whole duration of education, with full payment of salary or average personal income;
- attendance at courses of study during working hours;
- paid leave for taking examinations; on average 7-14 days for the preparation, and 3-4 days for the taking of the examinations;
- paid leave and all other conveniences for absence from work for the preparation and the taking of examinations for university graduate and post-graduate degrees and doctor's degrees, for university graduate degrees 3-5 months of paid leave, on average, and for post-graduate and doctor's degrees even more, depending upon the type of preceding preparation;
- assistance in the preparation of papers and studies in seminars, graduation, post-graduation and doctorate thesis and dissertations (payment of allowances for research expenses, preparation of projects, printing, etc.);
- provisions for participants in courses of study to merge paid educational leave with regular annual leave to extend the time for learning and examinations;
- paid or provided transport to and from the educational institution for those attending courses of study, or from home to the place of work while attending courses or taking examinations;
- travel expenses and per diem payment for taking examinations away from home;
- free text books and other supplies for education, or repayment of cost after their purchase;

- assistance in taking care of the children of those attending courses of study;

- temporary financial assistance in cases where only one member of the family is employed, in particular if the family has more than three unemployed members and when the income of the worker attending the course of study is minimal;

- paid professional and organized pedagogic and didactic assistance in learning and preparing for examinations;

- payment of teaching costs, if these are not already borne by the education system.[34]

These provisions vary among the enterprises and industries. In Slovenia, an incentive payment of 5.7 percent of a workers wage may be paid to the individual over and above regular salary as an incentive to participate in educational programs. This form of incentive payment is also being experimented with in France where management has sometimes provided managerial trainees with 110 percent of salary for special educational effort.

A factor in Yugoslavia's concern with adult education is the scarcity of qualified manpower. There is social pressure on the young to enter the job market following the completion of secondary education with the expectation that they can continue their education in line with their employment. In the last three decades, Yugoslavia has attempted a variety of ways to revamp its educational system. The 1950 General Law on Education and the Resolution on Vocational Education (1960) was given "new impetus by the Resolution of the Federal Assembly on the development of Education on the Basis of Self Government in 1970."[35]

Yugoslavian efforts in Paid Educational Leave and Recurrent Education should be viewed in the context of the goal to construct a complete educational system that will have the following characteristics:

a) the unity and equality of all forms and ways of education, i.e., the removal of differences and limitations between the so-called internal and socially

---

[34]Ibid., p. 213.

[35]Ibid., p. 211.

recognized education and their systems of qualification;

b) the equality of education of both youth and adults, i.e., the abolition of differences in the social status of the so-called full-time and part-time courses of study, or in other words, between those who take studies before entering work and those who simultaneously work and go in for part-time courses of study or take educational leave for studies (without leaving work);

c) completion of provisions for the realization of the concept of recurrent education, i.e., making provisions for everyone to leave the educational system at any time and to start work, and later on to re-enter education without any obstacles or new requirements;

d) completeness of every form of education in the system of post-elementary education, i.e., the obligation of every form of post-elementary education (and every school) to offer a given professional qualification, or the capacity for the performance of working functions in a given occupation;

e) the introduction of the linear instead of the concentric system of teaching/learning content;

f) the vertical and horizontal mobility of pupils and students within the educational system and groups of occupations;

g) gradual merging of final phases of the present secondary education and the initial phases of higher education and the abolition of limits between them, to break off the dualism in the system of education where the gymnasium type is assigned to prepare the young for studies in institutions of higher education exclusively, while all other post-elementary schools (professional and vocational) prepare their pupils for immediate entry into the world of work.[36]

It appears that Yugoslavia has accepted a concept of recurrent education which urges the young to find employment and pursue a learning process tied to working. Thus, enrollment in the higher grades would come more and more from the world of work. It remains to be seen what the rate of participation will be over the coming years and whether or not

---

[36]Ibid.

the socially oriented approach will provide the worker with the right to pursue a program of study based upon his own free choice and individual personal needs.

4. The Interested Parties

This section will discuss the interest shown, the perspective, the potential benefits to, and the roles played by management, government and education with regard to Paid Educational Leave (PEL) development in various countries.

In most industrialized countries, the concept is being pressed most strenuously by the labor representatives. It is interesting to note however that the practice of granting PEL had been a unilateral activity of management for many years before labor broached the subject for joint consideration. Thus, both parties recognized the utility of PEL. Management feels that PEL should be limited to those employees for whom specific education and training programs will enhance their usefulness on the job, and to suggest job related limits on the eligible courses of study to be financed out of corporate funds. Unions, in Europe, support vocationally oriented education, but they tend to emphasize the need to apply PEL to the general, civic and trade union educational needs of workers.[37]

Trade Unions have had considerable success in bringing education and training to the collective bargaining table. Possibly one of the reasons has been the fact that, once introduced, an education and training program in its initial stages visibly benefits the company as much or more than it affects the union, society, or even the individual worker. The unions' effort to obtain the maximum individual benefit through the educational opportunity program is the spur to continuing negotiation on wider eligibility clauses and broader and more liberally interpreted study programs.

United States labor and management have a substantial number of agreements that provide relatively large sums of money for education and training. For the most part, these are limited to the job related character of company-paid educational opportunity programs. Some 118 clauses have been negotiated into German labor-management agreements which provide for paid educational leave and other educational benefits. The French have integrated their previously arrived at collective bargaining agreements into a national law. The Italians are experimenting with a negotiated 150 hour paid education leave provision.

---

[37]Paid Educational Leave, International Labour Conference, 59 session 1974, pp. 4-8.

The majority of available funds are almost exclusively for job-related, skill-development activities. But a significant number of Labor-Management agreements already exist which include mutually beneficial educational opportunity programs which will provide the individual worker with almost unlimited educational possibilities for career and self improvement.[38] The pressure of the unions for the right to paid educational leave not only for vocational training and retraining but also for trade union, general, social and civic education usually has led to management resistance to paying for all these objectives, however worthwhile they may be to the industrial and social systems of the nation. Thus, one or occasionally both parties have turned to their governments seeking financial support.

Rarely has a European government, liberal or conservative, resisted a joint effort by management and labor to obtain financial assistance. In some nations, unions have approached labor oriented supportive governments to take action despite the reluctance of management. In most cases, governments have shaped the laws providing paid educational leave with a view towards resolving some significant educational need. Laws in Germany and Belgium emphasize youth by setting age limitations on eligibility. Other governments set limitations on income, or emphasis upon employment, under employment or retraining opportunities for those whose jobs have been jeopardized by foreign trade, or for educational opportunities for minorities, foreign workers and women workers. It seems fair to state that in Europe there has been considerable tripartite discussion of PEL and related forms of Educational opportunity.[39] This discussion is only just beginning in the United States.

Perhaps as the dialogue develops in the United States, we may at the outset be able to improve on the European

---

[38]The initial fears of high cost in countries which have adopted collective agreements or laws providing Paid Educational Leave have been mitigated somewhat by the fact that only a small number of workers in all countries have taken advantage of the opportunities available to them.

[39]The Canadian Congress of Labor has recently passed a resolution at its National Convention calling upon all its affiliates to "initiate policies that will provide for paid educational leave though their collective agreements and that the CLC urge the federal government to endorse and implement ILO convention #140 in its entirity."

experience. It is startling to realize that the educational establishment has not been a significant factor in initiating or developing the concept and practice of Paid Educational Leave or Recurrent Education. In fact, the OECD 10 nation study concludes, "so far, neither in the United States nor in Europe have traditional teaching systems been capable of providing for the educational needs of industry, trade unions and adult workers. However, it is essential for a coalition to be established between the worlds of education and labor if strategies are to be devised for instituting paid educational leave, recurrent education and other training programs for workers and their families."[40]

It is hardly conceivable that the educational establishment in the United States is unaware that unions annually administer some $30 million of public education and training funds and that they thereby provide some of the most effective education and training in this country. Or that American corporations spend billions of dollars on education and training including about $20 million for tuition aid programs.

In concert with management, unions have developed collective agreements which provide educational entitlements running into hundreds of millions of dollars which are largely unused by American adult workers and ignored by educational institutions whose strained budgets might be partially relieved by some innovative programming and experimentation which attempts to develop new delivery systems attractive and feasible for adult workers and their families.

---

[40] Developments, p. 80.

5. Afterword

More and more persons beyond the compulsory schooling age are enrolling in formal instructional programs. Conservative estimates by the U.S. Office of Education put participation in adult education at 13 million in 1969, 15 million in 1972 and 17 million in 1975.[41] Others have estimated the total at twice this number. Consistently, only about half of those surveyed say they were enrolled in vocational or occupational programs. An estimated 50 million indicated in one survey that they would participate except for lack of money.[42]

Paid educational leave--leave given to an employee for educational purposes for a specified period during working hours, with adequate financial entitlements--offers the opportunity to make educational enrichment a real possibility for working adults. Paid educational leave for the purposes embraced by the notions of continuing and recurrent education, including general, social and civic and trade union education, could enable Americans to break the lock-step life-cycle of education, work and retirement and use the recurring opportunities to better cope with the changes they face both in society and in the workplace.

The experience of several European countries highlights the importance of having the social partners work together to establish agreements on the goals and processes of paid leave programs and recurrent education. Cooperative discussion and negotiation, among at least two of these three groups, has been the hallmark of developing paid leave programs.

In the United States, the union and management programs, both unilateral and bi-lateral, have provided funds and often programs for worker education. The purposes, however, have largely been limited to job skill upgrading at all levels and trade union training. Few have included paid leave provisions for general, social and civic education.

---

[41] U.S. Office of Education, National Center for Educational Statistics, Participation in Adult Education, 1969 and unpublished tabulations for 1972 and 1975.

[42] Peterson, Richard and Abraham Corp., Learning Interest and Experiences of Adult Americans, Educational Testing Service, 1973.

The OECD/CERI report emphasizes the fact that the European educational systems were not alert to the development of paid educational leave. The impetus for the program came from forces outside the government, for example, from the trade unions (as in Belgium) or from the employers' organizations (as in Sweden). "Although several countries (e.g., France, United Kingdom, Yugoslavia, Belgium) had undergone a recent reorganization of their technical education systems, there is no evidence that any impetus for educational leave of absence came from the education sector itself. There is rather the impression that the education sector was regarded as something quite apart from the idea of educational leave of absence and industrial training. This was sometimes explicitly reflected in the regulations which emerged and formed the basis of the various programs.[43]

> The CERI report sums up this point by asserting: In fact, in all the documents requested by and submitted to the government (United Kingdom) by the various bodies for consideration when drafting regulations on educational leave of absence, nowhere do we find a policy statement, nor a request for one, from the traditional education sector.[44]

In American today, there is a movement toward industry, labor and education cooperation to improve the quality of educational programs for workers and potential workers at all ages. The social partners are increasingly facing up to the end of the era of distinctly separate developments controlled by independent institutional sovereignties.

Educational institutions have the faculty and facilities to offer general, social, civic and labor education, in addition to the skill and specialized programs. Management and labor have already, and will increasingly, make available financial aid and time for employed adults to take advantage of these opportunities. Government agencies can supply supplemental funds to keep this cooperation growing and to foster additional steps, such as technical assistance, educational counseling and recruiting, common reporting and analyses of impact, to ensure that these activities promote the common good.

---

[45] Developments, p. 27.

[46] Ibid.

BIOGRAPHICAL NOTE

HERBERT A. LEVINE is professor and chairman of the Department of Labor Studies and director of the Labor Education Center, Institute of Management-Labor Relations, University Extension Division at Rutgers--The State University of New Jersey. A native of New York City, he studied at City College of New York and the University of Buffalo and received his doctorate of education from Columbia University. He has held a variety of union positions, including those of local union officer, editor and reporter of union periodicals and international representative. He is an officer, executive board member and active member of the American Histadrut Cultural Exchange Institute, the A. Philip Randolph Institute, the League for Industrial Democracy, the Jewish Labor Committee, the American Association of University Professors, the Industrial Relations Research Association and the American Federation of Teachers AFL-CIO. He was a founder and first president of the University and College Labor Education Association. In recent years, he has written about and participated extensively in collective bargaining negotiations over paid educational leave, tuition refund programs and recurrent continuing education.